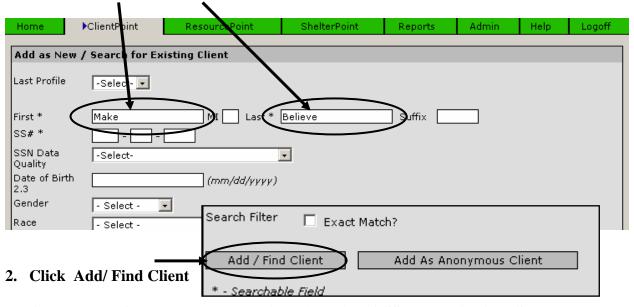
# ADDING OR FINDING A CLIENT OR A HOUSEHOLD IN WISCONSIN SERVICEPOINT

#### 1. Put in the FIRST & LAST NAMES of the CLIENT

(Note: Do not fill in any other data element.)

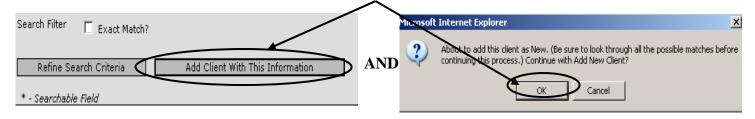


3. Check to see if there are any matching clients in POSSIBLE MATCHES.

## If NO MATCHING CLIENT,



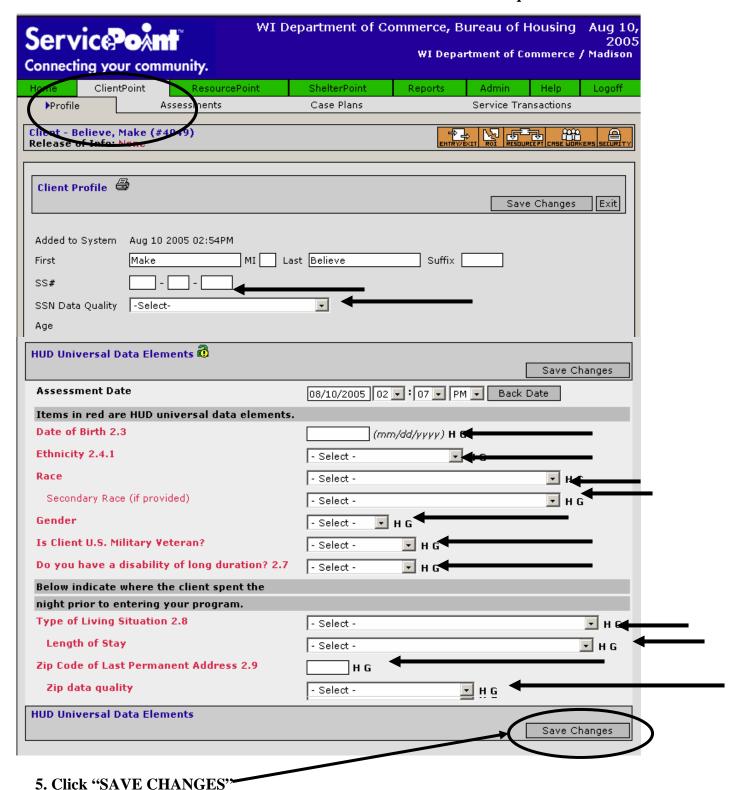
## Then Click "ADD CLIENT WITH THIS INFORMATION"



## If THERE IS A MATCHING CLIENT, CLICK ON THE NAME OF THE CLIENT



4. You will automatically go to the PROFILE PAGE of CLIENTPOINT, where you should answer all of the HUD UNIVERSAL DATA ELEMENTS ASSESSMENT questions.

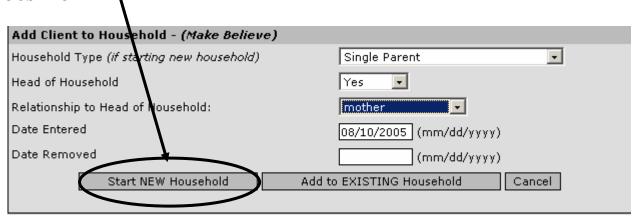


#### **NOTE:**

- If the CLIENT is SINGLE, GO TO RELEVANT SERVICE RECORD.
- If the CLIENT is in a HOUSEHOLD, CREATE HOUSEHOLD (follow steps below)
- 6. CLICK "ADD THIS CLIENT TO HOUSEHOLD"



7. Answer the question about who the CLIENT in the HOUSEHOLD, the Click "START NEW HOUSEHOLD" .



8. Put in the FIRST & LAST NAMES of the HOUSEHOLD MEMBER

(Note: Do not fill in any other data element.)

-Select-

SSN Data

Quality

Add Clients To Household - (Make Beneve) Overview - T pe: Single Parent, # Clients: 1 Edit Household Type Relationship Date Intered Date Removed **Head of Household** Name 🧷 🕨 Believe, Ma mother 08/10/20 Add Additional Clients to Household MI Last \* Believe Suffix First \* Ida SS# \*

9. Click Add/ Find Client

Search Filter 

Exact Match?

Add / Find Client Add As Anonymous Client

\* - Searchable Field

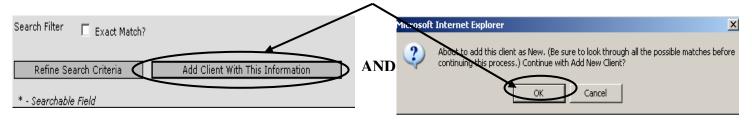
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10. Check to see if there are any matching clients in POSSIBLE MATCHES.

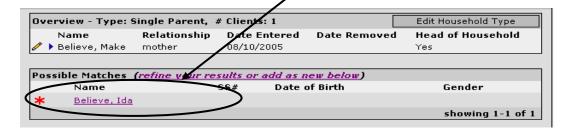
## If NO MATCHING CLIENT,



## Then Click "ADD CLIENT WITH THIS INFORMATION"



## If THERE IS A MATCHING CLIENT,



#### CLICK ON THE NAME OF THE CLIENT

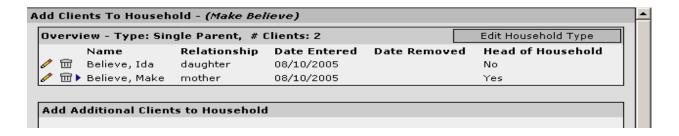
#### 11. Fill Out "CONTINUE ADDING THE HOUSEHOLD MEMBER"



#### 12. Click "ADD HOUSEHOLD MEMBER"

#### **NOTE**

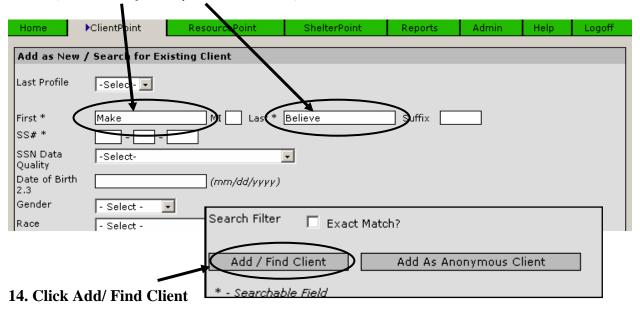
- If the HOUSEHOLD IS COMPLETE, then (follow steps below)
- If there are MORE CLIENTS IN HOUSEHOLD, then "ADD ADDITIONAL CLIENTS TO HOUSEHOLD by repeating Steps 8 -12 until Household is complete.



NOTE: For every individual entered into the hold complete Steps 13 - 17

## 13. Put in the FIRST & LAST NAMES of the CLIENT

(Note: Do not fill in any other data element.)

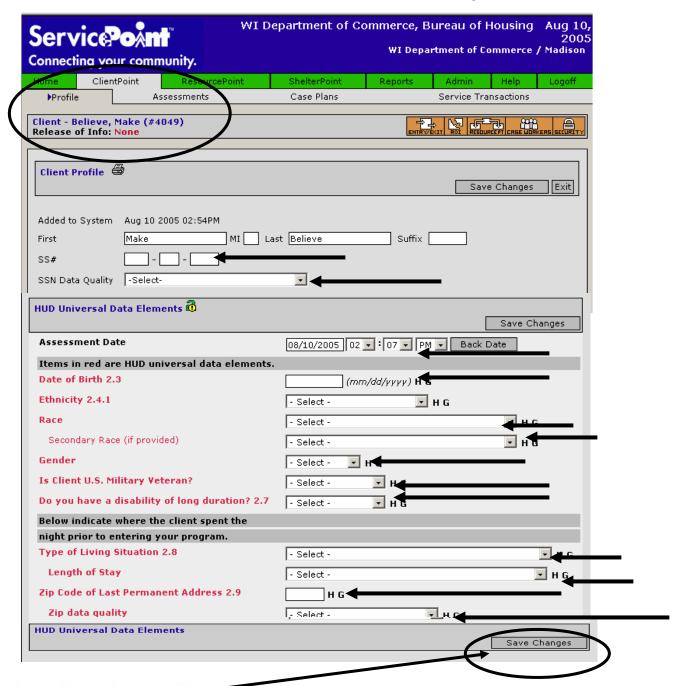


# 15. LOOK FOR CLIENT in POSSIBLE MATCHES – (note: if it is not here you made a mistake).



CLICK ON THE NAME OF THE CLIENT

16. You will automatically go to the PROFILE PAGE of CLIENTPOINT, where you should answer all of the HUD UNIVERSAL DATA ELEMENTS ASSESSMENT OUESTIONS.



17. Click "SAVE CHANGES"

*NOTE*: For every CLIENT IN THE HOUSEHOLD, the HUD UNIVERSAL DATA ELEMENTS ASSESSMENT should be COMPLETED. When all assessments are completed for everyone in the household, go to the relevant record of service.